

TIPS/PD Change List

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No.	Change List Item	Contact/ I.T. #	* Lvl of Effort	Release	Design Document
1	Redesign approvals functionality for PR's based on further integration with SAS. This new model would query SAS authorities when determining the approval needed for a PR. Notification to the approving user would be accomplished via an e-mail message. In addition, a new mechanism would be designed/developed to provide the approving user with a summary view of the PR, rather than routing the PR itself to the approving user (see item 6). <i>Not included in estimate:</i> (1) The new design should also incorporate the requirement from Prop. Accting that information on an approved PR be editable during Prop. Accting review (only funding info?), but not thereafter; (2) The approvals model for contracts/solicitations may also be updated based on the same/similar process used for PR's.	Various users	400 - 600 hours	1.1	<u>PR Approvals Enhancements</u>
1.1	vide System Administration functionality to maintain a "PR Allocation Route." The allocation route would default based on the Organization of the submitting user. The user stops on the Allocation Route would be 'hidden' from the user, making it impossible to alter the route while simplifying the process of submitting a PR.		200 hours	1.1	<u>Submit Functionality</u>
1.2	vide the ability to default the originator as the last stop on a predefined route (i.e., within System Administration, designate which routes should have this characteristic).	pilot users	20 hours	2.0	
1.4	tematically enforce Property Accounting Review prior to submitting a PR for processing. Estimate assumes that this characteristic of PD routes is maintained within System Administration. (Note: This requirement has been satisfied through the definition of allocation routes as defined in item 1.1).	Prop. Acct	see item 1.1		
1.5	tomatically notify Property Accounting when the funding for a Procurement has crossed a given threshold, or a funding code has been changed. Assumes the notification is within PD, and the list of notified user(s) is maintained in System Administration.	Prop. Acct	50 hours	1.1	<u>TIPS Release 1.1 Property Accounting Notification</u>
1.6	lify the client-server PR form so that it directly mirrors the web PR form (with some exceptions).	346, 345	60 hours	2.0	
1.7	implify Approvals process for buyers. Remove PD edit that requires approval in order to proceed (Solicitation, Solicitation Modifications Awards, Award Modifications, and Award Internal Corrections only).	369	40 hours	2.0	
1.8	he check for Controlled Items, GFP, Environmental, and WOS from PR save to PR Approve	1275			
2	igrate existing LANL fax software with TIPS/PD. Pursuing this item may be the catalyst to upgrade the Lab to WinFax PRO 8.0.	JAD	115 hours	1.1	
3	"Change Order" functionality to PD to accommodate internal changes to released awards (e.g., corrections, funding info. changes, etc.). The requirement would be satisfied using the existing Modification form with separate numbering scheme to track 'internal' changes.	Pat	135 hours	1.1	<u>Internal Correction Functionality</u>
4	ance web requisitioning	JAD			

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4.1	Support web attachments	JAD	See AMS Memo #550	1.1	<u>TIPS Release 1.1 Web Attachment Interface</u>
4.2	Support web PR Modification form	Matt			
4.3	Support document exchange other than PR (requester/buyer)	JAD			
4.4	Enable the user to complete the appropriate attachments: this requirement has two parts: 1. include edits to determine when certain attachments are necessary (e.g., checkbox indicates that the PR is for a service); 2. verify that the requester has created the appropriate attachments (e.g., prompt the user to enter the document number of the SOW if one has been deemed required based on the info on the PR).	1286, 1268			
5	Enable System Administration function to prevent Award Modifications that increase the value of the Award from being Released during fiscal year end processing (should be in place prior to Sept. 30)	Marty	45 hours	1.1	<u>TIPS Release 1.1 Year End Edit</u>
6	Provide a PR Info Summary window that summarizes all the PR information of interest to those making approvals and reviews - also, from the summary window provide a link to access complete PR information (i.e., open the PR). Property Accounting may require a 'specialized' summary view of the PR for their review function. Estimate assumes a single PR summary view that is read only.	Tim Milligan, selected requesters, 151	200 - 300 hours	1.1	<u>PR Approvals Enhancements</u>
7	Property System Interfaces	JAD			
7.1	PD to ACIS	JAD			
7.2	PD to other LANL automated ordering systems	JAD			
7.2.1	Avalon				
7.2.2	FSS				
7.2.3	JCI			2.0	
7.2.4	Library			2.0	
7.3	PD to Consultant database	JAD			
7.4	PD to Environmental system (Affirmative Procurement)	JAD			
7.5	PD to POIMS (Documentum imaging system) - Transfer image of the appropriate PD documents to POIMS at predefined points in the process.	JAD		1.1	
8	Incorporate close-out and archiving logic/functionality in PD. Interface PD to historical database so closed files can be re-activated.	JAD	See migration item list	2.0	
9	Property/PO System Integration				
9.1	Incorporate JIT functionality as an integrated component of the Desktop application	JAD	LANL/ AMS joint effort	2.0	

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9.2	Integrate PD and P-card applications (potential interface points include: (1) provide access to P-Card system from within PD so buyer can reconcile statements, (2) feed PR data (funding info, item descriptions, etc.) to the P-Card system in situations where the buyer processes a PR using their P-Card)	JAD			
9.3	Integrate PD and Invoice Approval applications (potential interface points include: (1) Provide access to IAS from within PD so the buyer can approve an invoice, (2) Provide access to PD from within IAS so the invoice approver can view contract information/milestone status, (3) Provide notification within PD that an invoice is awaiting approval in IAS)	JAD			
10	Strategically develop reporting strategy for users on the WEB, client/server, program management and BTLs. Consider Data Warehouse vs. PD reports (e.g., cycle time reports, vendor performance, payment status, etc.)	Pat	Hold JAD to define requirements	1.1	
10.1	ide team leader information (name & phone no.) in PR Status Report	User Group		1.1	<u>Procurement Status Report</u>
10.2	Owner to PR Status Report	271		1.1	<u>Procurement Status Report</u>
11	ide buyers with an internet bookmark to a web site that contains vendor debarment status.	Pat	None		
12	nlload changed user information only from legacy system to PD (Note: This is a CIC programming task).	Mark	CIC task		
13	hronize reference data between legacy and PD systems (e.g., organizational information). Option—provide batch program (e.g., once a week) that compares the PAID database to the PD database to help ensure data integrity.	Marty/Mark	400 - 450 hours	?	
14	ide System Administration task that allows the SA to access the desktop of any user for the purpose of reconciling documents/files on the desktop of a user who no longer works at the lab, or is unavailable (ICN login procedure currently prohibits access to another user's account).	Mark/Greg	160 hours	1.1	<u>TIPS Design System Administration - Remote Access</u>
15	Provide system edit to prevent Task Order amounts from exceeding the Master Agreement amount.	Pat/Dave	20 hours	1.1	<u>TIPS Release 1.1 Task Order/Master Agreement Edit</u>
16	ement 'color of money' edits. This change would involve incorporating system logic and associated edits that currently are performed manually during Property Accounting review of a PR.	JAD			
17	port electronic commerce (e.g., Solicitation posting, EDI)	JAD			
18	ement desktop 'copy' functionality	JAD			
19	ult additional milestone information (e.g., delivery info, PR submit milestone)	JAD, Bob Holder			

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20	port delegation beyond PD mail forwarding functionality (e.g., allow the user to specify a date range for the delegation). Note: Existing PD functionality supports the set-up and use of 'teams'. All members of a given team work from a common team cabinet.	JAD			
21	Implement TIPS Wizard (beyond phase 1)				
21.1	Implement client/server version with business rules/guidance to the user	JAD			
21.2	Include check for Excess when determining procurement method: check for chemicals and check for equipment nationwide at other labs.				
21.3	Implement web version with business rules/guidance to the user	JAD			
22	Implement Passive Notification (via email)				
22.1	Notify requester when new PR is needed for expired maintenance agreement	300		2.0	(will be required as a result of corresponding report: <u>Expiring Order Report</u>)
22.2	Notify requester when buyer is assigned	JAD			
22.3	Notify buyer of impending contract expiration - use existing alert functionality to notify both buyer and requester. Include a system administration task to specify when the alert is triggered (e.g., 60 days prior to expiration)	JAD, reports design group			
22.4	Notify requester/buyer when approver receives the document	JAD			
22.5	Notify requester when funding codes have changed for a procurement	JAD			
25	Provide Buyer Profile Maintenance task in PD System Administration (e.g., maintaining team structures, buyer responsibilities/buyer codes, etc.). Buyer code is necessary to report on team activity.	Pat 314		2.0	
26	Corporate tax structure used by LANL in PD so requesters will know complete PO and overhead costs (via enhanced PR Status Report)	Dave			
27	Provide mechanism for reflecting new user information in legacy system "real time" in PD (Note: This is a CIC programming task).	Mark			
28	Provide Vendor Relations Office with the ability to track Small Business Plans and semiannual updates to the plans.	Carlos Chacon			
29	Provide mechanism for vendors to register themselves in PD (e.g., via web or on-site terminal). This would involve downloading vendor data from a web page and/or another application (e.g., MS Access based application).	Pat/Dave			
30	Investigate the need to use the 10 digit FSC code to capture product and service information (PD currently stores 6 digits). The trailing 4 digits capture LANL specific information for the commodity.	Dave/Pat			

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31	Insure that vendor socioeconomic data is stored with the PO information in addition to the vendor database (to ensure that socioeconomic data is accurate for the time of the award).	Pat		2.0	
32	Enhance PD forms to capture data relevant to the following: <ul style="list-style-type: none"> Annual maintenance One-time Repairs 	Pat			
33	Provide functionality to allow the user to select multiple vendors at once from the Vendor Selection window (e.g., when selecting suggested vendors on a PR, or completing a Solicitation Mailing List).	119			
35	Develop maintenance task to 'clean-up' deleted EIS information from the PD database	Marty			
36	Enhance Procurement Desktop error messages to include LANL specific support structure assistance such as a phone number to call for assistance regarding the error message.	Lisa Gardner			
37	Vendor and Organization Maintenance Issues				
37.01	Enhance vendor Select function to select at the contact level, rather than the address level	270			
37.02	Allow the user to alter the drop point for the selected Deliver To contact name on a given PR (without changing the information in Organization Maintenance).	266 422	See Receiving Chg List		
37.03	Enhance Vendor Maintenance to resolve Remit To address issues	295, 263, 281, 226			<u>TIPS Release 1.1 Vendor and Organization Maintenance Design</u>
37.04	Enhance Vendor Search capabilities to include Socio-economic status, FSC as a search criteria	255, assoc. memo			as above
37.05	Enhance the Vendor and Org Search functions to make them more efficient/simple to the user	223			as above
37.06	Sort vendor search results by Vendor Name, not vendor no., in Vendor Search Window	227			as above
37.07	Change the State field in Vendor Maintenance to a table driven drop down list box	258			
37.08	Enhance Vendor Maintenance editthat requires a phone number for the main address (some Vendor Types include lab personnel)	Marty			
37.09	Include text field within Vendor field where the user may enter free form text. This information would then print on the PO above the Vendor information. Accommodates care of situation and attention and only applies when used.	Pat	24 hours		

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37.10	Include new system administration task that will automatically determine a vendor's county based on the zip code. This information is necessary to determine New Mexico gross receipts.	Reports Design group (Celso)			
37.11	Add Z number to Organization Search.	1362			
37.12	Enhance Vendor Search results such that no matter which address is selected, the Main address is always pulled into the form.	1279			
37.13	Remove "equals" as a search operator in Vendor and Org Search	1264, 1261			
37.14	Add a cancel button to Vendor Address screen. Currently have to enter all required information, even if you change your mind about entering a vendor.	440			
38	System Administration Search, Update, and Delete Enhancements				
38.1	Provide the ability to 'suspend' and 'resume' the use of reference data in System Administration. Issue - maintain current 'Delete' functionality?	Pat 363	40 hours		
38.2	Default the 'Search By' in System Administration User task to Last Name (rather than user ID)	253	done	Release 1.1	
39	'Cosmetic' changes to PD forms				
39.1	Move the Message Code field to the Line Item Funding tab	238			
39.2	Remove the Private and Government radio buttons on the Line Item Detail windows	236			
39.3	Change the Period of Performance label on Line Item Detail window	230			<u>TIPS Release 1.1 Form Enhancements & Cosmetic Form Changes</u>
39.4	Change 'Priority' field label to 'General Needed by Date'	222			
39.5	Change 'Priority Rating' field to table driven drop down list box	221			
39.6	Lengthen the Line Item extended description field	303			as above
39.7	Force user to enter End date if Start Date is entered on Line Item Detail tab	Pat			
39.8	Allow more text in Serial #, Part #, and Model #	424			
39.9	Only display up to 2 decimal places in line item detail and summary.	421			
39.10	Prevent the user from entering a delivery state that precedes the effective date of the contract - Effective date, Start Date	1323			
39.11	Default the Effective Date and Expiration date to the Start Date and End Date at the line item level from.	1322			
39.12	Make the PR Date on both c/s and web PR forms read only.	1272			
39.13	Do not allow the user the exact same funding strip twice for a line item. Force the user to alter the percent split instead.	1259			
39.14	Alter the wording of sole source justification options to encourage competition.	1255			
39.15	Change Property Number Required default to 'Don't Know'	423			

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40	Provide web user with the ability to copy information from the PR Status report (e.g., buyer's email address) for pasting in other windows applications.	306			
41	Provide the ability for PD users (client/server or web) to import scanned images as PD attachments (including large drawings for Fab orders). For client/server PD, remove the edit that restricts file imports to MS Word and Excel documents (.doc & .xls file types)	297 353			
42	Keep the TIPS Wizard open after closing any of the TIPS applications opened via the Wizard.	255			
43	Message of the Day				
43.1	Provide a 'Message of the Day' menu option that would allow the user to view the message of the day at any time from within PD.	25 4			
43.2	Enhance MOTD functionality in sys admin to turn MOTD on and off.	25 0			
44	PD enhancements needed to support PAID interface				
44.1	Make Work-on-Site, GFP required fields on Procurement Summary for PO data upload to PAID (Redesign the input windows for WOS, GFP, and Environmental)	Marty			as above
44.2	Provide a "Taxable Indicator" field at the line item level (all forms?, required?)	Marty, 347			
44.3	Make FSC code a required field on the Award document	Marty			as above
44.4	Add a 'Commodity Type' field and LANL subgroup	Marty, Pat			
44.5	Provide Invoice Processor field (3 char.) on Procurement Summary document	Marty			
44.6	Display OPI on the Procurement Summary document for update purposes (read/write).	Marty			as above
44.7	Move Foreign Country Code field to the line item level (currently at header level)	Marty			
44.8	Make the Message Code field required for all line items on the Award document (currently required for the 1st line item)	Marty			as above
44.9	Make State a required field in vendor maintenance	Marty, Pat			as above
44.10	Provide edit to prevent negative line item values (quantity and price) on the PR, award documents, and all mods	Marty			as above
44.11	Add quantity tolerances to web PR (is currently available on c/s line item pricing tab)	113			
45	Rework the wording of "Bid Due Date" on the Solicitation. This phrase does not apply to RFP or RFQ. Phrase needs to be coordinated with the type of Solicitation.	365			
46	Maintain line items that have been 'deleted' on a Modification form for referential integrity. A visual clue, or indicator, will be used to identify line items that have been 'deleted' via a Modification form. (not included in estimate: AP may have the additional requirement to 'zero out' the corresponding values for deleted line items).	396, 395, 389	80 hours		

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47, 48	<ul style="list-style-type: none"> • Provide fiscal year identifier in addition to doc number (a PO may be placed in 98, but the FY in its doc number is 97 because of the PR); or amend existing process of defaulting doc number forward. Default FY according to current FY, not previous doc number. • Re work the document numbering scheme so that the five digit counter is not duplicated very often (counter is currently reset at the beginning of the fiscal year). Do not reset the counter until the available unique numbers have been exhausted. 	394 400 416, 458	14 hours		
49	Award document Enhancements				
49.1	Include a Special Instructions field on online and printed award form (there is currently no comments field on the award form).	438			
49.2	Move the check for Contract Type from Save to Release (with other fields - depending on 436)	437, 505	10 hours		
49.3	Move check for all required fields from Release to Approve (this change depends upon item 1.7)	436			
49.4	Include additional text on printed PO with Ship Via DDLB selection (e.g., carrier, collect on tender #, plus do not insure, do not declare value) - may require a text field within the system administration task.	360 435	20 hours		
49.5	Rename the Generate button to be consistent with Last Modified field. Both should be Modified or Generated.	1314			
49.6	Give the user the option to print clauses on a PO mod or IC. Clauses may not be needed in all cases	488			
49.7	Don't print the signature page on an Internal Correction	485			
49.8	Add invoice terms at the line item level - may differ for each line item	499			
49.9	Get rid of release functionality - incorporate this step with approval so buyer saves the step	495			
50	Move Procurement Summary menu option to Pre-Award/Award menu	207, 1311	8 hours		
51	Allow editability of buyer information in PD (allow the user to edit the information <i>for a particular form</i>). All forms, all user related information.	368	60 hours		
52	Default Suggested Vendor from PR to Solicitation and Award document	356, 402			
53	Display drop down list options that are most commonly used at the top of the list (e.g., Invoice Terms = Net 30)	401, 1283, 1280			
54	Add sort facility to Locate functionality - allow user to sort by user name, document number, or date.	434			
55	Global Defaults		24 hours		
55.1	Add Deliver to and End User to Global Default option on line item Address tab	430 420	done	Release 1.1	
55.2	Add entire funding strip to Global Default - including all code fields, dollar amount, and percent split.	417			

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55.3	Allow the user to select more than one field when using Global Default, which would allow the user to default multiple fields at once.	1317			
56	Add a detail button to all vendor fields. Allow the user to view vendor detail , including address, phone , etc.	418			
57	Do not drop highlighting - for example, after approving a document, keep the document highlighted; after editing a document and closing it, keep the document highlighted.	414			
58	Dates - keep date format consistent whether editing or viewing the date. Either mm/dd/yy or XX Nov YY.	411			
59	Reduce number of screens				
59.1	Put all required line item fields on one tab	408, 407, 346			
59.2	Provide one central screen to enter all PO information	345, 459			
60	Add a new system administration task for Ship To addresses, since there are currently only 3 addresses that will ever be used.	Pat	16 hours		
61	Add new edit to all forms for funding - when entering a cost center, default the last two zeroes of the code. Users only know this code as a four character code, not the six character code it really is.	Pat	8 hours		
62	Provide the user with the ability to establish 'default preferences' for the Procurement Summary form.	Dave			
63	Enhance PD forms to force the user to complete the necessary forms/attachments when FOCI is required (on the PR and the award).	Reports design group			
64	Create new system administration task to maintain constraints definitions. Constraints are used in reporting to exclude certain types of awards based on Appendix F requirements.	Reports design group			
65	Allow the user to print sticky notes	473, 427			
66	Increase the size of the sole source justification field on both web and c/s Prs.	472			
67	Give users the ability to sort the contents of their cabinets (e.g., by file name, by date, etc.)	462			
68	Add checkbox for trade-ins on the PR form, which would prompt the user to enter the value of the trade-in when checked.	452, 1330			
69	Add the Requester to the PO.	443			
70	Restrict buyers' ability to edit funding on the Solicitation and Award documents.	1356, 1299 Robin, Lisa			
71	Enhance Copy From functionality to allow the user to create a copy of a document, including the same document number	1352			
72	Enhance Release functionality to provide a visual clue on the folder that a PO inside it has been released (e.g., red line through the folder, Released stamp over the folder)	1350			

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73	Default Procurement Summary info Number of Bids Requested based on SML information	1344			
74	Add edit to prevent the buyer from including big businesses on the SML if Set Aside has been selected on the associated Solicitation.	1342			
75	Change Socio-economic status default from blank to Small in the Vendor Search screen.	1334			
76	Change the default folder description in Workload Management from Assignment from... to the Master document number.	1327			
78	Default all required fields from line to line to reduce data entry	1327			
79	Prompt the user to generate clauses and conditions if they have selected a Clause template for Solicitations and Awards.	1315			
80	Change the Contact drop down list to a text field on the Solicitation Mailing List; alter the Solicitation printed form to reflect what has been typed in the field.	1310			
81	Printed Forms				
81.1	Printed Solicitation: Change the "FOB Point" text to say "FOB"; "Shipping Point" to "Shipping Point (including zip code)"	1306, 1304			
81.2	Provide functionality to print entire file at once, without highlighting each individual document in a file	500			
82	PR Summary				
82.1	Enhance PD to allow the user to attach a sticky note within the PR Summary	1296			
82.2	Enhance the PR Summary screen to allow the user to route directly from the screen without closing it	1291			
83	Enhance the PR an dPR Summary to display the total number of line items	1295			
84	Add an option to Preferences to allow the user to control how often alerts pop up if they have not been received.	1292			
85	Store the buyer code of the person who accepts a PR - this information is required in PAID and we currently do not store this information in the PD database. PAID needs to know which buyer is responsible for the PR.	Pat			
86	Incorporate additional PAID edits - fields required in order to Release an award: An award with \$0.00 cannot have a '2A' Message Code.	Marty			
87	When a user indicates that Chemicals are being procured on the PR (in the Controlled Items), automatically default the Ship To address to SM31 (different from the warehouse address that defaults)	489			
88	Modify funding edit to allow the user to close line items without validating funding - if FMIS server is down or valid codes are not known, user is 'stuck' in funding strip	469			

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